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SCORE Chapter Website Migration Guide

Chapter Website Migration Team
Version 1.0
February 22, 2011

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Version History

Date	Description	Version
January 14, 2011	First Draft	1.0
February 22, 2011	Reviewed and approved by Falahyar Fatmi/SCORE Director of IT and Bert Oltmans/New Website/CRM Project Manager	1.0

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1. Overview

1.1 Why is SCORE changing its chapter websites?

SCORE is a national brand, it's important that all SCORE chapter websites have consistent branding, look and feel, and navigation.

1.2 What are the advantages of the new chapter websites?

There are many advantages to the new chapter websites:

- ✓ Consistent branding, look and feel, and navigation will be enabled with templates provided by Forum One Communications (www.forumone.com) an award-winning Alexandria, Virginia-based digital communications firm.
- ✓ SCORE's wealth of content, both local and national, will be organized by industry, topic, demographic, and geography.
- ✓ The new websites will serve up content – workshops, events, templates, tools, news – to clients and visitors based on the industry, topic or location they have expressed an interest in.
- ✓ Chapter webmasters will be able to add, change and delete content and pages using Drupal, the leading open source content management system (CMS). With several hours of training, persons with average computer skills can manage content. They do not need to know HTML or programs like Adobe Dreamweaver® or Microsoft Front Page®.
- ✓ All new chapter websites will be hosted free of charge in the same hosting environment used for www.score.org eliminating the expense of maintaining separate hosting accounts.
- ✓ SCORE will adopt a standard convention for chapter website URLs: www.chaptername.score.org and chaptername.score.org further reinforcing our national brand and eliminating the cost of individual chapter domain registrations.
- ✓ Virtually every type of content you have on your current chapter website will be able to be included on the new website: images, files, links and text.

1.3 How to use this guide

The purpose of this guide is to familiarize SCORE chapter webmasters with the new websites and prepare them for the migration process that will happen in April 2011. It is *not* intended to be a user manual for content management. A complete **training manual** with step-by-step instructions for migrating and managing content will be made available to SCORE chapter webmasters in March 2011.

2. All About New Chapter Websites

2.1 Who is building the new chapter websites?

Forum One Communications, a leading digital communications firm based in Alexandria, VA, is building the SCORE national website and chapter website templates. For more information about Forum One, visit their website at www.forumone.com.

2.2 How the new chapter websites are structured

The new chapter websites will be part of SCORE overall online presence: a national website with chapter websites that have **consistent appearance and navigation**, and are tightly integrated with each other. The new chapter websites will be distinct from the national website, but will be easy to locate and access from the national site.

Websites or web pages for SCORE **districts and branch/center/satellite** offices will not be supported in the Phase 1 release scheduled for 4/29.

As part of the design process, Forum One has provided SCORE with website **wireframes** that specify the layout of the majority of website pages. Wireframes are basic visual guides used in website design to suggest the structure of a website and relationships between its pages. Wireframes are *not* graphic designs that depict the appearance of the completed site. They lack color and actual images. Think of them as the blueprint for a house – it shows how many rooms there will be, and how they are arranged, but it doesn't show what the finished house will look like.

Wireframes for selected chapter website pages can be found in **Appendix D, E and F**.

A complete sitemap of the chapter websites can be found in the same section of the Volunteer Center that you used to access this document:
http://volunteercenter.score.org/chapter_migration_tools.html

2.3 How the new chapter websites are constructed

The new national website and the local chapter websites are constructed in a slightly different manner than some websites you may have created or are managing: they are built around a **content management system (CMS).**

A CMS is an automated solution designed to simplify the publication of web content to websites and mobile devices—in particular, allowing content creators to submit content without requiring technical knowledge of HTML or the uploading of files.

The content management system that SCORE has selected for the New Website/CRM project is **Drupal**, the leading open source CMS. For more about Drupal, visit their website at http://drupal.org/.

The Drupal CMS that is the foundation for the new chapter websites will enable chapter webmasters and non-technical personnel to add text, pictures, hypertext links and even create new pages in their chapter websites without knowing HTML or "WYSIWYG" programs like Adobe Dreamweaver® or Microsoft Front Page®.

Forum One has developed **custom templates** for SCORE's chapter websites. The templates enable chapter webmasters to manage content in specific areas of the site, while maintaining consistency across all sites for elements such as look and feel, spatial arrangement and navigation.

2.4 What the new chapter websites will look like

SCORE chapters will be able to select one of two templates that Forum One has developed. They are referred to as **Template A and Template B**. See Appendix A and B for images showing the homepage designs. A communication from Devin Jopp was sent to all chapter webmasters and chapter chairs on February 11 asking them to select the template they want to use. If you haven't selected your template by **February 21**, a skeletal chapter website will be automatically generated in April using Template A. While it will not be impossible to switch templates after your website is implemented, it will be difficult.

2.5 What functionality and content will be included in the new chapter websites?

All new SCORE chapter websites will include the following sections/pages, accessible from the main menu:

1. **Mentoring** – This is where clients access mentoring, both face-to-face and online
2. **Workshops & Events** – This is where clients access workshops and events
3. **Templates & Tools** – This is where clients access resources like templates, tools, files, etc.
4. **About SCORE** – This is where clients learn about the local chapter and its capabilities
5. **Our Impact** – This is where clients learn about how SCORE helps entrepreneurs and view success stories
6. **Topics** – This is where clients can access all types of content – workshops, events, templates, tools, news, etc. – organized by topic.
7. **Donate** – This is where visitors can donate to SCORE National or their local chapter
8. **Volunteer** – This is where visitors can volunteer for SCORE online
9. **News** – This is where visitors can access the latest news and SCORE and SCORE activities

A complete sitemap of the chapter websites can be found in the same section of the Volunteer Center that you used to access this document:
http://volunteercenter.score.org/chapter_migration_tools.html

2.6 How much control will chapter webmasters have over the new chapter websites?

Chapter Webmasters *will* be able to:

1. Create an almost unlimited number of pages with content in the **About Us** section of the chapter website
2. Select a **homepage image** for the top of the page (template A only)
3. Add a block of text to appear next to the homepage image (template A) or at the top of the homepage (template B)
4. Select **images** for Mentoring, Workshops & Events, and Templates & Tools for the carousel (template A) or the stacked boxes (template B)
5. Add/change/delete local **partner/sponsor logos**, with links to partner websites, to the lower right side of the page
6. Add a **newsletter signup box** to the homepage, which appears as the Stay Connected signup box at the upper right of the page
7. Select Featured **Success Stories** from among you own success stories to place on the chapter website homepage
8. Add/change/delete **social media links** to your chapter social media pages at the bottom of the chapter website homepage
9. Select **Featured Workshops & Events** to appear on the chapter website homepage and Workshops & Events page
10. Select **Featured Templates & Tools** to appear on the chapter website homepage and Templates & Tools page
11. Edit content on the **Donate** page
12. Edit the **En Español** page
13. Edit **News** detail
14. Edit **Statistics** detail

Chapter Webmasters *will not* be able to:

1. Change the **main menu**
2. Connect pages they create to the main menu or other navigational elements. New pages created by webmasters will be accessible via links from other pages only
3. Change the arrangement and positioning of visual elements on the homepage or other standard pages

Chapter Volunteer Centers

The new SCORE national website will provide a **national volunteer center** that is also partitioned into separate volunteer centers for each chapter. When a volunteer logs in to the national volunteer center, the system will recognize his/her login and take them to their chapter's volunteer center. Volunteers will be able to post content items, share content, participate in discussions, locate other volunteers by skill, industry and other attributes and collaborate in other ways.

3. How Chapter Websites Will be Created and Implemented

3.1 How will SCORE chapters create their new websites?

1. Forum One will create template **skeletal sites** for each SCORE chapter. It will contain the basics – chapter name, address, contact info, chapter personnel, disclaimers, copyright, menus, etc. The skeletal site will not have any chapter content such as workshops, templates, tools, or partner links in it, but it will be ready to go live on 4/29 even if nothing is added to it.
2. As described in Section 2.4 above, chapters have selected one of two basic **template designs** for their site.
3. The site templates include pre-designed page templates for important and often-used pages like the homepage, Workshops & Events, Templates & Tools, etc.
4. SCORE chapters have two options for migrating their content items from their current chapter websites to the new chapter websites. They can elect to **migrate content themselves**, supported by training on the Drupal content management system; or they can elect to **let SCORE National migrate their content for them**. Chapters will be asked to select which option they want to use by 3/14.
5. Chapters that elect to have SCORE National migrate their site content for them will need to provide their current website hosting account login to National.
6. For chapters that elect to migrate content themselves, **training** will be provided on using the Drupal CMS and building out their chapter website.
7. After training, chapter webmasters will have approximately **30 days** to build out their new chapter website (see timeline below).
8. All content migration, whether done by SCORE National or chapter webmasters will be done between **3/31 and 4/28**.
9. Chapters can continue to add content to their websites on an ongoing basis after **hard launch on 4/29.**

The following elements will be already inserted in the skeletal website that is created by Forum One and ready on 3/31:

1. Chapter Name
2. Chapter Address
3. Chapter Phone
4. Chapter Fax
5. Chapter Email
6. Site Map
7. Privacy Policy
8. Terms of Use
9. Copyright Information
10. Footer Links to Other Standard Pages

3.2 What is the timeline for building the new chapter websites?

Key dates for the chapter website migration are shown in the table below:

Activity	Dates
Training of chapter webmasters on creation of new chapter websites and use of the Drupal content management system	3/14/11 to 4/28/11
Migrate content from current chapter websites to new chapter websites	3/31/11 to 4/28/11
All new chapter websites **go live**	4/29/11

3.3 Content Tagging

When asked what they would like to see in a new SCORE website, the majority of clients and volunteers respond that they want to be able to **locate content quickly and easily**. Locating content is one of the major benefits that content management systems like Drupal offer. They accomplish this by enabling users to "tag" content. To tag a piece of content is to assign one or more descriptive words to it. For example, if a SCORE webmaster wants to post a business plan for a restaurant, he or she would assign tags such as "restaurant" and "business plan". That would enable a user searching on either of those words to locate the business plan.

One of the most important tasks in migrating content like templates and tools that clients and volunteers will search on is to ensure that they are correctly and completely tagged.

A SCORE Drupal Training Guide is being developed by Forum One and will be made available to all chapter webmasters via the same page in the Volunteer Center that you accessed this document from. It will contain step-by-step instructions for all phases of content migration and site management.

3.4 Training

Training for SCORE chapter webmasters in the buildout of their new chapter websites is scheduled for the week of March 14, 2011. Training will be in the form of recorded webinars that you can view at your convenience, and a manual on use of the Drupal content management system.

SCORE is recruiting a team of volunteer webmasters to coordinate training at the district level and answer questions.

3.5 Domain Names

The new www.score.org website, and all the individual chapter websites, will be hosted in the same hosting environment managed by Forum One Communications. This means that chapter website domains will be sub-domains of www.score.org. The convention for chapter website sub-domains and URLs will be: www.chaptername.score.org.

An email informing all chapters of their new sub-domain names and URLs was sent out in January. A list of the new sub-domain names and URLs can be found on the same page in the Volunteer Center that you visited to download this document:
http://volunteercenter.score.org/chapter_migration_tools.html

If you feel that your chapter name needs to be changed, which will change your URL, notify your District Director.

When the new chapter websites go live on the hard launch date, chapter webmasters will need to login to their web hosting accounts and set up a server-side 301 redirect from the old domain name to the new one. This will ensure that search engines are directed to the new domain.

All SCORE chapters are expected to set up redirects from their current chapter website to their new chapter website on 4/29, to coincide with the 4/29 hard launch date. All chapters should have their redirects set up by 10/31/11.

If you need some guidance on setting up a 301 redirect, Google Webmaster Central is a good place to start. Follow this link:

http://www.google.com/support/webmasters/bin/answer.py?hl=en&answer=93633

Chapter webmasters can choose to set up forwardings with or without masking their current domain at their own discretion.

3.6 Search Engine Optimization

SCORE is working with a Google Analytics Certified Consultant supplied by Forum One to define defining site metric goals, create Google Analytics reports, and apply the latest SEO principles that apply to Drupal websites.

3.7 Hosting Accounts

One of the benefits of the New Website/CRM project is to eliminate the expense and duplicated effort of managing individual web hosting accounts at the chapter level. In order to realize this benefit, chapters will be expected to close their hosting account and eventually let their current domain name expire. Chapters that keep their current chapter websites in production after hard launch on 4/29 must do so at their own expense, as they are currently doing.

Chapters that shut down their current websites may have paid web hosting or domain registration fees in advance. SCORE National regrets that it cannot reimburse chapters for the unused balance of these accounts.

3.8 Email

Email is a critical part of SCORE's national and local online presence. SCORE has partnered with Google to use their popular Google Apps Email product to help SCORE strengthen its brand through consistent SCORE-specific email addresses and eliminate the dependency of local chapters on their web hosting accounts for email services.

Google email is an optional free service for all volunteers.

Google Apps Email addresses for SCORE volunteers follow this naming convention:

firstname.lastname@scorevolunteer.org

Chapters can elect to transition all volunteer email addresses to Google Apps Email starting now. POP/IMAP forwarding can be set up in Google Apps Email to forward emails to each volunteers' personal email address.

Google Apps Email is not the same as Google's gmail product, but the user interface is similar.

The table below shows the policy and procedure for obtaining various types of Google Apps Email addresses.

Email Address Type	Policy	Procedure	Timing
Individual volunteer email addresses firstname.lastname@scorevolunteer.org	Volunteer/chapter discretion	Request from http://support.score.org	Available now
Chapter email address contact.chapternumber@scorevolunteer.org	Chapter discretion	National will set up in advance. Will be posted in Volunteer Center.	Available 3/14/11
Chapter functional email addresses function.chapternumber@scorevolunteer.org e.g. webmaster.0513@scorevolunteer.org	Chapter discretion	Request from http://support.score.org	Available 3/14/11

To set up Google Apps Email addresses:

1. Go to http://support.score.org
2. Click the Submit a Ticket link on the left side of the page
3. Select the Google Apps Provisioning and Support option from the Ticket Type drop down list

A user guide for volunteers and chapter administrators for both the conversion and subsequent use of @scorevolunteer.org, and tips and techniques for interfacing their messaging application with the new system will be distributed separately.

3.9 Chapter Homegrown or Third-Party Applications

SCORE National regrets that it cannot replicate every homegrown or third-party applications that chapter have featured on their websites.

A comprehensive and robust scheduling solution will be made available to all chapters in a subsequent release scheduled for mid-summer 2011.

Chapters will be allowed to set up links from their new chapter website to their legacy chapter website to provide access to mission critical applications for volunteers and clients.

3.10 Marketing Activities

We strongly suggest that all SCORE chapters initiate some marketing activities to keep local clients informed and use the new website launch for maximum marketing advantage. Anything that's news worthy is a good excuse to reach out to customers.

1. Start informing customers in April that our new website is coming.
2. Place a banner about the new website on your current site.
3. Start mentioning the new website in April editions of chapter newsletters and workshop marketing.
4. Ask all counselors to mention the new website to their clients in April counseling sessions.
5. Follow up with clients after the 4/29 launch date to make sure they know how to find things that they were using on the old website.
6. SCORE National will be providing suggestions and materials for local marketing campaigns.

SCORE chapters can control posting of local partner/sponsor logo images and links on their new chapter website homepage. This can be done for consideration or on a no charge basis. The current policy that prohibits the sale of partner/sponsor goods or services on SCORE chapter websites will remain in effect.

Chapter can add an almost unlimited number of partner/sponsor logo images and links to their websites. Three will be featured on the homepage: one in the upper right corner, the other two at the lower right. The rest will be accessible via the Our Partners page.

3.11 Workshops & Events

One of the main benefits of the new websites is tight integration between Constant Contact Event Management and the new national and chapter websites. Workshops created using the free Constant Contact accounts available to all SCORE chapters will appear in the new national site and the new chapter websites.

Please note that Constant Contact Event Management is not the regular email marketing module that most chapters are using. Rather, it is a comprehensive solution that manages all aspects of event management. There are several advantages of Constant Contact Event Management over 123Signup and other event management solutions that chapters may be using:

1. You can track workshop marketing from opens and clicks all the way through to registrations
2. It will be tightly integrated with the new volunteer center and CRM.
3. It's free. Chapters pay only the credit card processing fee, unlike 123Signup and other solutions

Training on Constant Contact Event Management will be rolled out in late February/early March.

Appendix

Appendix A – Chapter Website Design Template A

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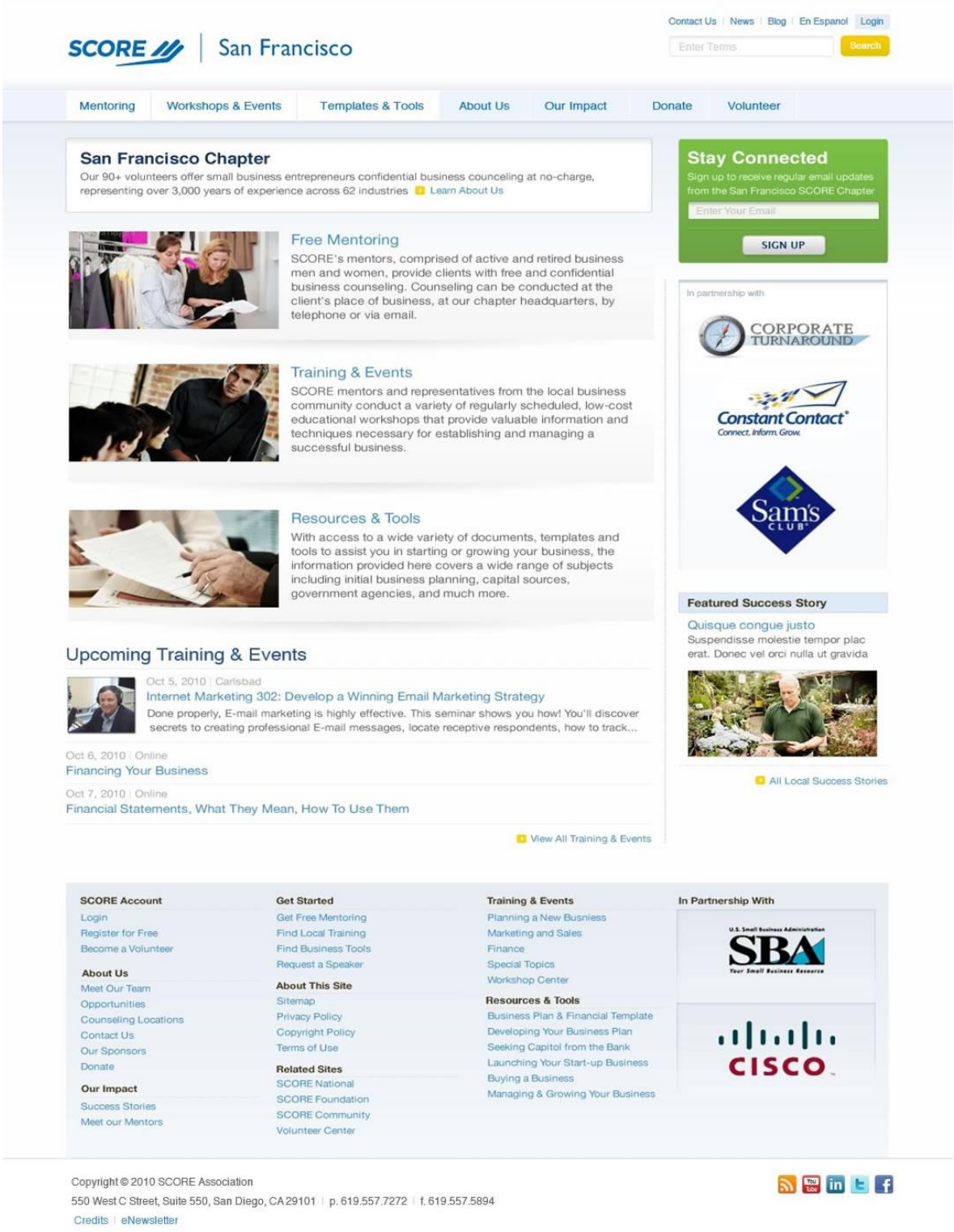
Appendix B – Chapter Website Design Template B



Appendix C - Chapter Website Migration Checklist

Use this checklist to guide you through the migration process.

No.	Task	Timeframe	Status
Preparation			
1	**Build awareness**. Start talking about the transition to the new website at chapter meetings.	February	☐
2	**Build a team**. If you have a large website with a lot of content, or an outdated website, start building a team. Reviewing and updating content is labor-intensive.	February	☐
3	**Review content**. Is your content current or outdated? Use Google Analytics or whatever dashboard your hoster provides to see how many people actually visiting those pages.	February	☐
4	**Pick your template**. As mentioned earlier in this document, chapters will have two template designs to choose from. Like a lot of site content, this decision may need to be reviewed and approved by chapter leaders. See Section 2.4, What the new chapter websites will look like. Make sure you have your template selected by 2/21.	February 11-21	☐
5	Switch your workshop program to **Constant Contact Event Management.**	February	☐
6	Transition to **Google Apps Email** ("@scorevolunteer.org") if your chapter email is provided as part of you chapter web hosting account. Go to http://support.score.org to sign up.	February	☐
7	**Decide** whether or not you want to migrate your own content or have National do it for you.	March 14	☐
Content Preparation (if you will be migrating content yourself)			
8	Select **homepage image** and short description	February	☐
8	Select **carousel images** and text (Chapter Homepage Design A only)	February	☐
9	Select **sponsor logos** and links	February	☐
10	Select **success stories**	February	☐
11	Select **social media links** for homepage footer	February	☐
12	Select **templates and tools**	February	☐
Training			
13	Training of chapter webmasters is scheduled for the week of March 14, 2011. Online training materials will be provided, including documentation on building out your new site using the Drupal CMS. More details will follow. Even if SCORE National is migrating your content, you may want to have someone get trained so they can maintain your chapter website on an ongoing basis.	March	☐
Content Migration (if you are migrating content yourself)			
14	**Migrate your content** from your legacy site to your new chapter website: images; sponsor logos and links; success stories; templates and tools; social media links; workshop and	April	☐

No.	Task	Timeframe	Status
	events		
Marketing Activities			
15	Start informing customers in April that our new website is coming.	April	☐
16	Place a **banner** about the new website on your current site.	April	☐
17	Start mentioning the new website in April editions of chapter **newsletters** and workshop marketing.	April	☐
18	Ask all counselors to mention the new website to their clients in April counseling sessions.	April	☐
19	**Follow up** with clients after the 4/29 launch date to make sure they know how to find content that they were using on the old website.	May	☐
Implementation			
20	**Review** new website with chapter stakeholders	April	☐
21	Set up **301 redirect** to point old domain to new domain	April 29	☐
22	Check site after go live to ensure content is successfully migrated	April 29	☐

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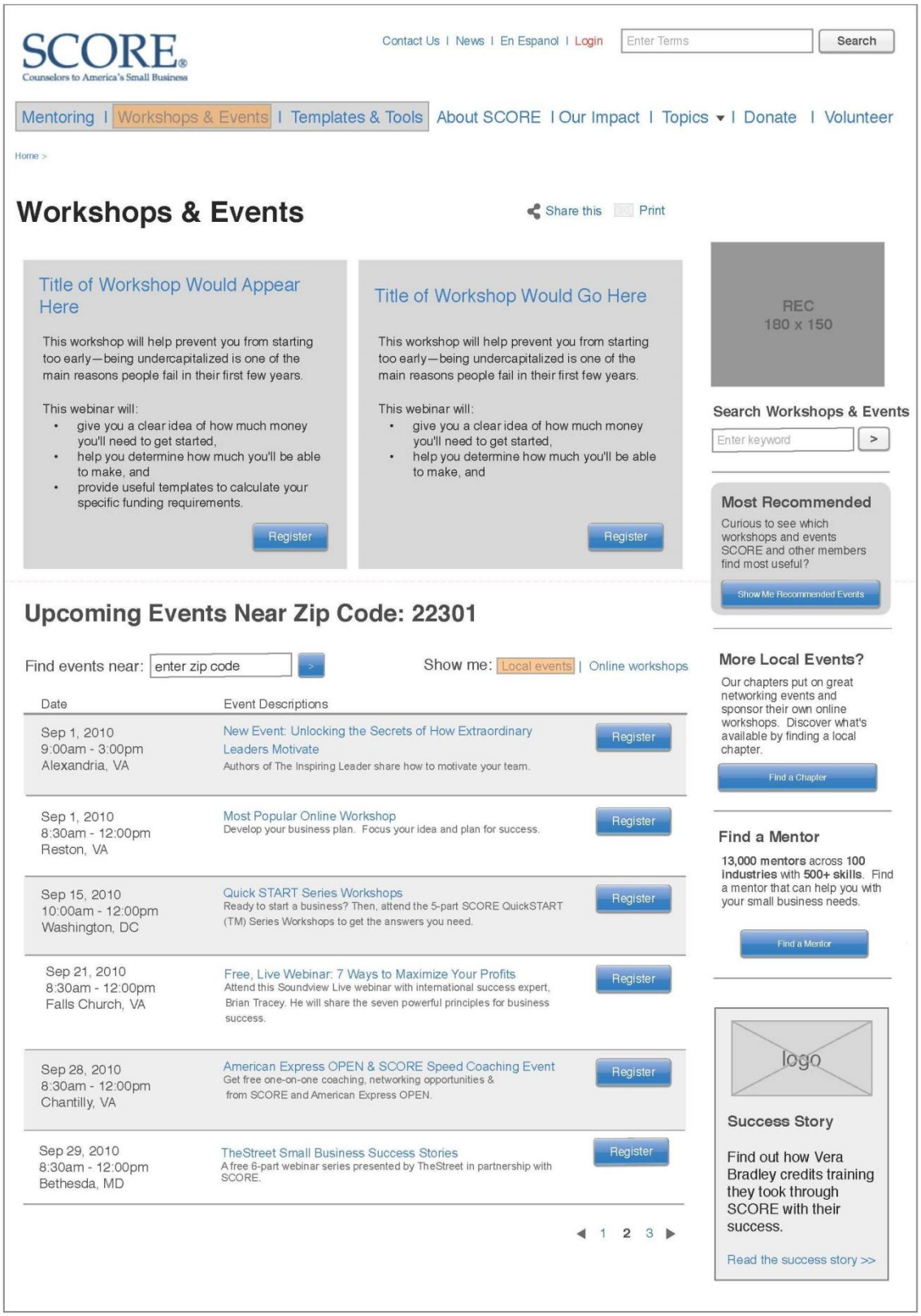
Appendix D – Workshops & Events Page Wireframe



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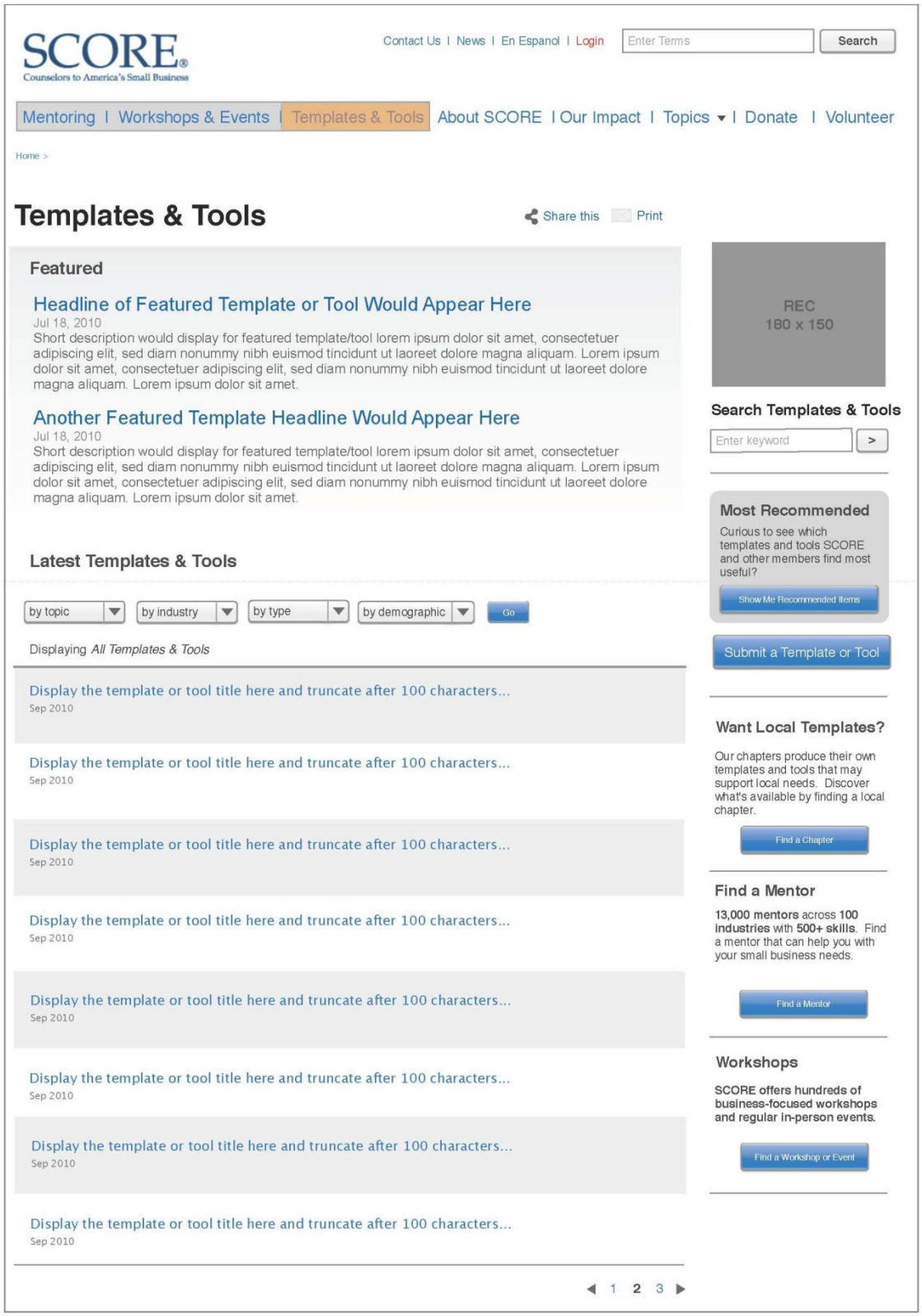
Appendix E – Templates & Tools Page Wireframe



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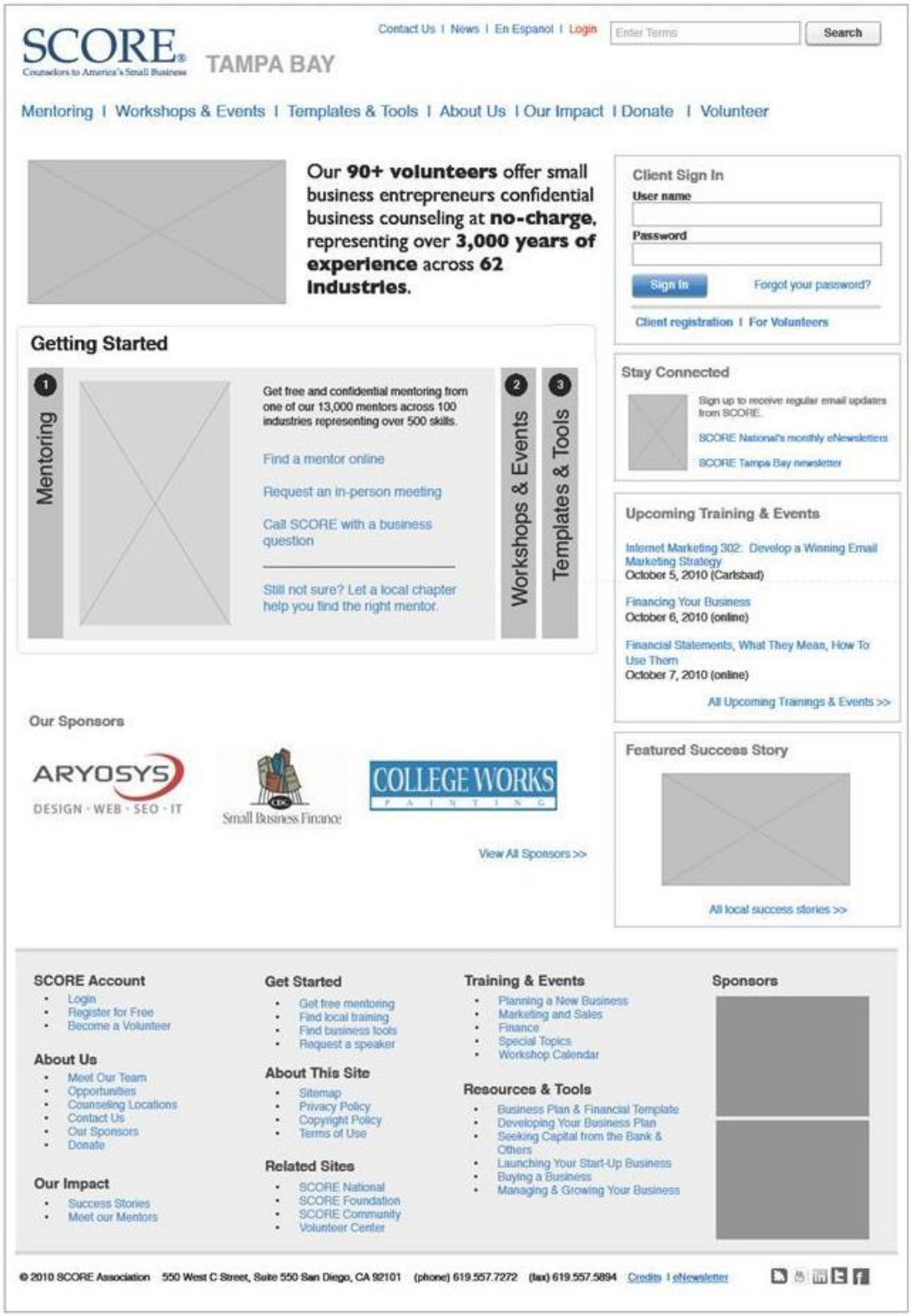
Appendix F – Chapter Website Homepage Wireframe